

| ERP VENDORS |



ERP
TODAY

annual vendor review 2021

Advanced
Epicor
IFS
Infor
Microsoft

Oracle
QAD
SAP
Unit4
Workday

ERP buyers have never had it so complex



This year's vendor report takes a close look at the 10 key ERP vendors that are suited to mid-market and enterprise customers. The roll call of vendors has changed slightly from last year along with the emphasis of my introduction. **BY PAUL ESHERWOOD**

Last year I opened this report with the statement that 'ERP buyers have never had it so good'. And, although that still rings true – the fact is that ERP buyers have also never had it so complex. Cloud enterprise applications are 20 years old and during the last two decades vendors have developed ever-more sophisticated applications, architectures and platforms. In the same way that legacy on-premise applications accumulated complexity through customisations, so too has the cloud application landscape through a hairball of integrations. Many enterprises have developed an incredibly complicated labyrinth of applications and platforms which diminishes their effectiveness and takes considerable time, money and effort to manage.

The first flush of a seismic change is set to sweep the ERP landscape and those vendors that can adapt to the new priorities for ERP buyers will reap the benefits

throughout the next major purchasing cycles.

During the last five years or so, technology has developed at an exponential rate. Automation, machine learning, containerisation – to mention just a few – have opened up a world of new possibilities for vendors and ERP customers. But, the rate of technological advancement has outstripped the pace of evolution within most ERP suites. Put simply, the majority of ERP vendors have been so busy retooling their legacy applications and trying to move their install base onto the latest version of their software that they haven't been able to keep pace with the rate of technical possibilities. Some are still trying to rewrite legacy code into a cloud product – by the time that process is complete the idea of SaaS 1.0 will be redundant.

The largest vendors, despite their immense financial power, cannot reinvent themselves every 12 months. They chart a course,

like an oil tanker does, and set sail. Changing direction is simply not possible when there is so much invested in a particular direction of travel. Equally, at the smaller end of the market, niche players do not have the financial resources to be in a constant state of flux – their investments have to pay off and they can't move to the next big thing until the first has paid dividends.

This leaves an incredible opportunity for mid-market ERP vendors that have the financial headroom to invest ahead of the curve but are not weighed down by the trappings of a monolithic organisation.

It was once the case that these mid-market players were trapped in no-man's-land. Too small to eat at the top table and too expensive to play at the small end of the market. But today, it is precisely these organisations that have the product, leadership and ambition to deliver for ERP customers that have a completely different set of priorities than they did just a few years ago.

A word about our partners

ERP TODAY has collaborated again with Lumenia on its second 'Annual ERP Vendor Review'. Lumenia is an independent boutique consultancy specialising in ERP and business systems strategy, vendor selection and deployment. Despite their size they are one of the most respected vendor-agnostic authorities of ERP knowledge in Europe. I have worked with the Lumenia team for over a decade and their expertise and impartial acumen sets them apart from all other sources of ERP know-how. Lumenia does not sell software and their independence means that they have no vested interest in pushing clients towards particular software solutions. They focus instead on how enterprise applications can best be used to transform business processes and deliver measurable business benefit to their clients, whether this is through the deployment of new software or by getting more value from systems that are already in use.

Lumenia has developed unique methodologies that allow clients to undertake ERP and business change programmes using structured processes that maximise the likelihood of project success by promoting business ownership, minimising risk and controlling cost, while ensuring that planned business benefits are realised. None of the vendors have paid for their inclusion and the analysis which follows is our collective independent view of the respective offerings.



John Donagher



Ian O'Toole

Lumenia is delighted to partner once again with ERP Today in the production of this vendor review. Ten of the leading providers are profiled in detail over the following pages. While the vendors may vary in scale, product range and industry focus, certain market trends are evident and worthy of commentary.

Functionality Trends

The days of difficult to use, clunky ERP systems may not be entirely gone but there has certainly been a massive leap forward over recent years in the standard of ERP user interfaces. ERP systems are becoming easier to use with the types of consumer-grade interfaces we are all familiar with from smartphones and browsers. Mobility continues to be a strong theme, with ERP solutions responding to the expectation that users are not sitting at the same desk all day. The trend is clearly towards systems that, as well as being user-friendly to work with, actually help to speed up business processes, through tools and technologies such as artificial intelligence, machine learning, robotic process automation, augmented reality and the internet of things. Every ERP vendor covered in this review is on this journey to some degree at least, and at this stage the direction of travel is clear to all.

Cloud Trends

As ERP consultants working with mid-market and enterprise clients on a daily basis, deployment strategy is a recurring topic. In terms of trends, we have seen a huge swing over the last ten years from on-premise to cloud. Clients have changed from 'having a look' at cloud options, but almost inevitably opting for on-premise, to insisting on cloud deployments right from the start. There are still sectors where on-premise is actively considered or even favoured for various reasons, but cloud – in its many different flavours – is now dominant for organisations implementing a new ERP solution.

The other cloud-related trend – as you will see in the reviews – is the move of the market in general towards cloud-based architectures, rather than on-premise type solutions hosted in the cloud. These are often enabled by technology delivered by hyperscalers such as Microsoft Azure or Amazon Web Services. In this review alone we see the launch of new platforms from IFS, QAD and Unit4.

Architectural Trends

A recurring theme for those involved in selling, planning, delivering or managing ERP solutions has always been how best to deal with gaps in ERP functionality. Many vendors address this by focussing on specific verticals and delivering the 'last mile' of functionality. In reality that still often falls short, even for those vendors with years of experience in a sector, as new challenges will always arise. Customisation is a dirty word, leaving a legacy of applications that organisations fear to upgrade due to the prohibitive cost and complexity. Integrating best of breed or niche solutions is always an option, but can be costly to build and maintain.

Add to that the challenges posed by the digital world. Organisations are clamouring to take advantage of digital technologies, but this demands a solid core ERP system interacting with systems around the edges or externally.

The good news from the authors of modern ERP solutions is that the cloud-based architectures make it much easier to configure, extend and connect, both within the application and externally to other applications.

Commercial Market Trends

The inexorable trend in the ERP market is towards subscription-based licensing models. While many ERP vendors still offer perpetual licensing it is likely that the attraction of a long term subscription revenue stream, and an increased general acceptance of the subscription model for consuming services, will mean that the perpetual licensing model will fade away.

The ERP market is often viewed as pretty staid, yet every year most of the vendors covered in this review will make acquisitions to enhance their offerings. The transition to cloud-based architectures described earlier facilitates the integration of acquired solutions into an overall ERP offering.

Finally, we have recently seen Acumatica and Sage Intacct enter the UK and Ireland ERP market. Though not covered in this review, both products are well-established names in North America and offer cloud-based ERP solutions.



Advanced is one of the largest providers of business software and services based in the UK. They boast 19,000 UK customers across a very broad spectrum of sectors and organisation sizes. Their product range stretches beyond what would traditionally be considered ERP to cover line-of-business and sector-specific solutions across a broad range of business areas. Their cloud solutions include Cloud Financials, Cloud HR, OpenPeople (payroll), Workforce Management, Clear Review (employee performance management and engagement), eMarketplace (online supplier catalogue) and Contract and Tender Management (procurement). Perhaps uniquely, Advanced also provides a unified platform, MyWorkplace, that allows multiple products from their portfolio to be deployed in one user interface with a single sign-on. Like many vendors they facilitate the extension of their core products with a variety of additional apps and widgets. Advanced products are delivered in the cloud, on hybrid models and on-premise. They offer a full range of managed services to support their applications and infrastructure.

Key products

Cloud Financials

Cloud HR

OpenPeople (Payroll)

Workforce Management

Clear Review

eMarketplace
(Online Supplier Catalogue)

Contract & Tender Management
(Procurement)

They can be combined with vertical solutions:

Cloud Engage
(Membership and Fundraising)

DRS, InfoSuite and Workhub
(Social Housing and Field Service - Resource Scheduling, Business intelligence reporting and Workforce Management)

Talent (Sports - Ticketing)

StaffPlan (Social Care - Rostering)
and Care Director (Social Care Case Management)

ProSuite and Cloud School
(MIS - Education)

Docman (Document Management)

Carpe Diem (Time)



LINES OF BUSINESS

Public, mid and lower mid-market: Finance, HR/payroll, procurement, document management, vertical solutions for third sector, membership and sports.

Health and Care: Out-of-hours, urgent and unplanned care, document management / workflow for primary and secondary care, EHR community and clinical decision support.

Legal: Case management solutions for solicitors and barristers, plus legal forms software.

Education: Student information systems for schools, academies / Multi Academy Trusts, further education and private training providers.

Business type suitability

Advanced's broad product range means that there are solutions within the portfolio that are suitable for many types of organisations of different scales with different requirements. Of their 'horizontal' back-office solutions - i.e., ones that are broadly applicable across many business sectors - they offer financial and procurement solutions ranging in suitability from

small and medium business up to enterprise level. In the HR space they have a number of enterprise level solutions as well as mid-market and SME offerings including workforce management, time and attendance, payroll and access control.

SIZE OF BUSINESS

- Advanced sells its products and services into a range of different sized business, depending on the solution, ranging from lower mid-market up to enterprise scale customers.

Vertical suitability

While the mix of horizontal solutions and vertical-specific solutions means that Advanced can address most verticals, it is worth highlighting some of the key solutions which make Advanced somewhat unique in their focus. Advanced has a number of solutions targeting each of the following sectors - education, organisations requiring field service management, charities and membership organisations, health and care organisations, sports and entertainment, professional services and legal. These range from core back office solutions to those that address specific HR and workforce

management needs to the niche service delivery and management needs of some of these sectors.

VERTICAL MARKETS

Public and Private Sector

Legal

Education

Health and Care

Third Sector

Go-to-Market strategy

Advanced sells and implements directly as well as through a dedicated partner channel. They have 43 active channel resellers in the UK. The size of this channel reflects the breadth of solutions and verticals served and allows Advanced to wrap their solutions in service delivery that is really close to the verticals and customer types served, thus bringing additional value to the core product proposition.

Advanced works with its UK technology channel partners through a programme it calls TruePartner. Its product development teams engage with independent software vendor (ISV) partners to ensure that its cloud product sets facilitate further development by ISVs enabling enhanced product specialisation.

Licensing and pricing

Naturally, Advanced cloud solutions are priced on a subscription model and this applies to most of their product range. However, some products are also available on more traditional perpetual licence and services model. A significant proportion of the client base is still on a perpetual model reflecting longevity of tenure in many cases. It can be expected that the proportion of SaaS customers will increase steadily over the coming years as more and more migrate to new cloud-based solutions.

Customers

BURNLEY FC is a sports and entertainment ticketing customer of Advanced and a user of their Cloud HR platform. They were an early adopter of the MyWorkplace unified platform.

NUGENT CARE is a longstanding Advanced customer that has moved from an on-premise finance solution from Advanced to their Cloud-based solution, Cloud Financials. They also adopted the MyWorkplace unified platform.

LANGWORTHY MEDICAL

PRACTICE Real-life testing for an AI algorithm to read patient letters in conjunction with Advanced's cloud-based Docman solution and only highlight those to GPs that require their input. Advanced has worked on this with researchers led by academic GP Dr Ben Brown and in collaboration with Spectra Analytics. They plan to extend the trial across the whole of England during 2021.

(time management solution for the legal market) illustrate. Furthermore, with its portfolio of line-of-business solutions, Advanced is well positioned to have a presence in organisations that also have larger ERP solutions in place. Although this focus on niche verticals and line-of-business solutions might suggest that Advanced products tend to be used in smaller organisations exclusively, it lists organisations such as the NHS, the BBC and Harvey Nichols as customers.

EASE OF DEPLOYMENT AND KEY CONSIDERATIONS

With such a broad range of solutions available from Advanced it is difficult to say anything definitive that applies to all. However, as most are now cloud-deployed SaaS solutions many technical deployment considerations are simplified. In terms of deployment effort, the very fact that the solutions are quite focussed potentially makes for simpler deployments where business process analysis and change are less impactful than on larger generalist ERP implementations. Another element that potentially eases user adoption, a key task in any implementation, is the ability to tie multiple solutions together into a single user experience with MyWorkplace.

KEY STRENGTHS OF THE PRODUCT

Because of the breadth of solutions available from Advanced it is impossible to list the benefits of each here. Suffice to say that the very breadth of focus is a key strength. It is not breadth in a 'one-size-fits-all' sense, rather it is in the sense of a wide portfolio of very focussed solutions. This can be attractive to organisations wishing to avoid the square peg/round hole challenge of adapting processes to more generalist solutions. Some of the verticals served by Advanced – legal and education are two that stand out – are not typically well served by more traditional ERP or back-office solutions so Advanced can provide particularly strong options here. Advanced continues to broaden its stable of line-of-business solutions as the recent acquisitions of MitreFinch (workforce management) and Tikit

DEPLOYMENT

• CLOUD

Cloud Financials, Cloud HR, Business Cloud Essentials, Contract and Tender Management, Cloud School, ProSuite, Cloud Engage, Care Director, eMarketplace, Docman

• HYBRID CLOUD

Workforce Management, OpenPeople, DRS, Workhub, InfoSuite, Staffplan, TALENT, Carpe Diem

EPICOR

Epicor is a US headquartered mid-market provider of ERP and business applications with a focus on manufacturing, distribution and building supply merchants. While less well known as a brand than some of the other vendors featured in this review, Epicor is long established and has over 20,000 customers in 150 countries around the world.

It markets five main products in the UK. Epicor ERP 10 is its broadest ERP solution and it is widely used in manufacturing, distribution and engineering field service businesses. Epicor BisTrack targets building supply merchants. Epicor Prophet 21 is an ERP for distribution businesses. Epicor Tropos is a process manufacturing solution and Epicor Advanced MES provides manufacturing execution capability which can complement ERP solutions in manufacturing environments.

Epicor products are available in a variety of deployment models in the cloud and on-premise.

Later this year Epicor plans to release ERP 11 with a new 100 percent browser based, device independent user experience and added industry-specific manufacturing functionality.

Key products

Epicor ERP

Epicor BisTrack

Epicor Prophet 21

Epicor Tropos

Epicor Advanced MES

LINES OF BUSINESS

- Manufacturing and operations
- Finance
- Sales
- Inventory management
- Production planning
- Manufacturing execution
- Service management
- Collaboration
- Delivery scheduling



Business type suitability

Across its product range Epicor products serve customers ranging from the very small to the large. The Epicor ERP 10 product is squarely positioned as a mid-market to upper mid-market solution. Epicor states that it typically works with organisations generating revenues in excess of £25m per year. Epicor ERP 10, in particular, has many implementations in organisations with revenues at multiples of that figure into the hundreds of millions of pounds. Indeed Epicor ERP 10 is sometimes implemented in plants or divisions of much larger organisations in a hub-spoke model.

SIZE OF BUSINESS

- Typically, Epicor works with organisations generating revenues in excess of £25m per year.

Vertical suitability

In the UK Epicor provides innovative and highly focussed industry productivity solutions to manufacturers, distributors and building supply merchants. Within these sectors, Epicor has customers within many sub-verticals such as: metal fabrication; industrial machinery;

plastic and rubber products; plumbing supplies; food and beverage; hi-tech electronics; tooling; instruments and controls; fasteners, valves and springs; electrical assembly; steel stock-holding; furniture and fixtures; and medical devices. Epicor ERP 10 is also used by organisations in other verticals keen to implement core ERP functions alongside capabilities like CRM and HCM all within a single solution.

VERTICAL MARKETS

Manufacturing

Distribution

Building Supply Merchants

Metal Fabrication

Industrial Machinery

Plastic & Rubber Products

Plumbing supplies

Food & Beverage

Hi-Tech Electronics

Tooling

Instruments & Controls

Fasteners Valves & Springs

Electrical Assembly

Steel Stock-holding

Furniture & Fixtures

Medical Devices

Go-to-Market strategy

Epicor sells and implements directly in the UK and also through a focussed partner channel. Epicor lists eight active channel partners in the UK market and claims to have almost 150 resources dedicated to the delivery of Epicor ERP in the UK. While this channel is well developed, it is not as broad as some of Epicor's larger competitors. Epicor does have a well-established UK presence itself and supports its prospects in identifying the most suitable partner as well as providing backup expertise when needed. Epicor's channel includes partners that can enhance the depth of vertical experience in some cases, and can augment core Epicor solutions with add-ons and supplementary products to meet specific customer requirements.

Licensing and pricing

All Epicor products are typically available on a concurrent user basis for most functional areas. While not completely unique this is less and less prevalent across the industry. It can be particularly attractive to manufacturers with multiple shifts where concurrency reduces the required user count compared to a named user model. There are some exceptions to this model - for example the HCM elements of the ERP solution are licenced on an FTE basis (as is typical for HR solutions). The products are available on a variety of payment models and Epicor ERP 10 is available on subscription for cloud deployments or on a more traditional perpetual licence model.

Customers

BRADFORDS BUILDING SUPPLIES is one of the largest independent builders merchants in the UK. An

Epicor BisTrack user, they relied on Epicor BisTrack Delivery to help safely serve customers with collection pickup times during the COVID-19 pandemic using functionality they adapted to meet the need for a touchless click and collect app.

PJH GROUP, a leading national distributor of bathrooms and appliances is supported by Epicor Prophet 21.

IRACROFT is a premier supplier of a comprehensive range of metal pipe and tube fabricated products for diverse industry sectors and an Epicor ERP user. Iracraft has used technology, with a strong Epicor ERP backbone, as both an enabler and supporter of growth.

Assemble-to order) in mixed modes, which is a key differentiator. It has maintained flexibility in deployment models which is sensible for an organisation targeting manufacturers, which have been more hesitant in embracing purely cloud ERP solutions than organisations in other sectors.

While it targets the mid-market, Epicor ERP 10 can be an ideal solution for larger organisations wishing to implement a hub-spoke model with a Tier 1 solution at the core and a Tier 2 solution like Epicor providing deep functionality with simpler implementation in manufacturing sites or divisions.

EASE OF DEPLOYMENT AND KEY CONSIDERATIONS

Epicor claims that its products are primarily deployed as multi-tenant cloud solutions, but customers have the option to deploy hybrid, single tenant, or on-premise. The Epicor 10 ERP product is available in multi-tenant, single-tenant and on-premise varieties with the cloud solutions being deployed on Microsoft's Azure platform. As already pointed out, this deployment flexibility serves its target sectors well.

Epicor issues major release upgrades every six months with minor updates and maintenance releases for incremental enhancements and security best practices issued more frequently.

DEPLOYMENT

- Epicor products are primarily deployed as multi-tenant cloud solutions, but customers have the option to deploy Epicor products as hybrid, single-tenant or on-premise.



IFS has established itself as a major player in ERP, Enterprise Asset Management and Field Service Management solutions across a range of industries. Known for its particularly strong offerings for asset-intensive and project-based organisations, IFS has invested in innovative new technologies, such as digital twins, augmented collaboration, internet of things, and intelligent process automation. 2020 saw the acquisition of Clevest Solutions, a leading provider of mobile workforce management solutions in the utilities vertical. The launch of IFS Cloud sees an architecture update and increased choice for customers. IFS continues to offer customers a range of deployment options, and IFS Cloud heralds a transition to an evergreen model, with a twice-yearly feature update cadence rather than major version updates every two to three years. IFS has partnered with Boomi to provide an integration platform, recognising that in modern digital enterprises ERP solutions must co-exist with many other systems and act as a good citizen.

Key products

IFS Applications

IFS Field Service Management

IFS Maintenix

IFS Cloud

LINES OF BUSINESS

- Service management
- Manufacturing
- Supply chain
- Project management
- Finance
- Human resources
- Quality management
- Document management
- Customer relationship management
- Business intelligence
- Sustainability management



Business type suitability

IFS broad range of enterprise applications is targeted at upper mid-market enterprises and lower large-enterprise customers with global presence, who manufacture and distribute goods, maintain assets, and manage service-focussed operations. IFS tends to do well with manufacturers (particularly project-based and engineer-to-order), organisations that build and maintain assets, and organisations that manage service-focussed operations. Organisations with complex needs spanning more than one of these areas are a particular sweet spot for IFS as they can offer a comprehensive integrated solution. A good example would be an engineer-to-order manufacturer who also installs and provides after-market services for their products.

SIZE OF BUSINESS

- IFS products are suitable for all enterprise sizes from medium-sized businesses through to large enterprises.

Vertical suitability

IFS specifically focusses on five vertical markets: manufacturing; engineering, construction and infrastructure; energy, utilities and resources; service industries; and aerospace and defence. IFS also has specific expertise in a number of associated sub-industries such as food & beverage manufacturing, shipbuilding and maritime, and oil and gas. IFS has a long track record in each of these target verticals, with tailored solutions to meet the specific and unique needs of sectors such as defence and aviation maintenance. The functional breadth of the solution is an advantage in most verticals, with IFS offering both CRM and HCM functionality as part of the core suite.

VERTICAL MARKETS

Manufacturing

Engineering, Construction and Infrastructure

Energy, Utilities and Resources

Service Industries

Aerospace and Defence



Go-to-Market strategy

IFS has traditionally sold directly and delivered the vast majority of implementations, but this approach has changed and a partner channel is actively being developed. IFS currently has nine channel partners in the UK and Ireland (up from four in the last year) and a much larger network of partners and systems integrators globally. Partners generally have specific areas of industry expertise or geographical focus, and it is expected that additional channel partners will continue to be added over time. Channel partners focus on organisations with turnover below £100m, with IFS continuing to sell direct to organisations above that threshold.

Licensing and pricing

IFS' policy is to provide customer choice and they offer a range of licensing and deployment options. Customers can choose traditional on-premise deployments; deploy in their own data centres; use their own cloud providers such as AWS or Microsoft Azure; or use IFS Managed Cloud, a single-tenant solution deployed on Microsoft Azure and managed by IFS. Despite the new release being called IFS Cloud, the same version of the software is used regardless of the deployment model. IFS continues to offer customers a choice of perpetual licensing or SaaS subscription. Users of core modules are licensed on a named user basis.

Customers

PANASONIC HEATING & COOLING SOLUTIONS

Panasonic H&CS uses IFS Remote Assistance, a merged reality immersive experience solution helping experts assist colleagues or customers as if they were on-site. This enables installers, field technicians and

customers to share real-life situational context with remote product experts so that hands-on service and repair instructions can be visually demonstrated and acted upon.

PUKKA PIES British food manufacturer Pukka Pies implemented IFS to improve efficiency and meet increasing challenges posed by customers and regulators. Using IFS across finance, sales, purchasing and production, they have achieved a 10 percent increase in business growth, a 30 percent increase in workforce capacity, improved product traceability and quality assurance, better data visibility and reduced manual data entry.

MULTIPLEX An international construction contractor headquartered in Sydney, Australia, Multiplex uses IFS Applications across all regions to support streamlined processes, obtaining global consistency across all regions in which it operates while still respecting regional nuances. IFS has also provided faster and more accurate reporting and increased operational agility.

KEY STRENGTHS OF THE PRODUCT

IFS provides a very broad suite of applications covering service management, manufacturing, supply chain and project management, finance, human resources, quality management, document management, customer relationship management, business intelligence, sustainability management and other core functionality to facilitate full lifecycle management of products, assets, customers, and projects. Allied with deep industry experience and solutions that meet the specific needs of target verticals, IFS provides a very strong offering from a functional perspective. IFS certainly isn't being left behind from a technology perspective, with

the launch of IFS Cloud seeing a raft of new and improved capabilities, including: the introduction of a containerised architecture; completion of the transition to the IFS Arena user experience (replacing legacy desktop clients); a new workflow designer tool; new industry-specific lobbies (role-based, configurable, at-a-glance start pages for users); a chatbot; and an integration platform, powered by Boomi, with a range of standard connectors. IFS recognises that the vast majority of deployments will need some level of tailoring, and provides this capability in a number of ways: through personalisation and configuration, 'extend on the inside', with IFS application customisation in a layered application architecture, and 'extend on the outside', using APIs to interact with external applications.



EASE OF DEPLOYMENT AND KEY CONSIDERATIONS

The IFS strategy is to provide a suite of innovative user-friendly products that are easy to tailor, extend and connect with, offer a choice of deployment options, and which deliver genuine breadth and depth for their specific target industries and solution areas. The target market is firmly mid-sized to large enterprise organisations with revenues of £50m and up, as well as smaller organisations with complex requirements. The IFS partner channel is an evolving space, and caters mainly for the lower end of the market; it will be interesting to see how this strategy pans out over time in what is a very competitive marketplace.

DEPLOYMENT

- With the launch of IFS Cloud all IFS products are available on-premise, in a private cloud, or as multi-tenant in the public cloud.



Infor is a US-headquartered ERP and business systems vendor with global operations and a strong and long-standing representation in the UK. It offers a broad range of products available in the cloud and (some) on-premise. Apart from ERP solutions it has market-leading business applications for financial management, enterprise asset management, warehouse management, workforce management, HCM, networked supply chains, analytics and AI. Many of its ERP products are branded as Industry CloudSuites signifying their focus. These include CloudSuites for Automotive, Aerospace & Defence, Chemicals, Construction & Engineering, Corporate, Distribution, Distribution Enterprise, Equipment, Fashion, Food & Beverage, High Tech & Electronics, Industrial and Industrial Enterprise. In addition, there are three ERP solutions available in the cloud or on-premise - M3, LN and SyteLine. Infor also offers its own cloud platform and technology stack, Infor OS, which includes core technology components such as single sign on, security management, document management, collaboration (Mingle), integration (ION) and a data lake.

Key products

Infor Business Technology Platform

Infor Industry CloudSuites

Infor CloudSuite Automotive

Infor CloudSuite Aerospace & Defence

Infor CloudSuite Chemicals

Infor CloudSuite Construction & Engineering

Infor CloudSuite Corporate

Infor CloudSuite Distribution

Infor CloudSuite Distribution Enterprise

Infor CloudSuite Equipment

Infor CloudSuite Fashion

Infor CloudSuite Food & Beverage

Infor CloudSuite High Tech & Electronics

Infor CloudSuite Industrial

Infor CloudSuite Industrial Enterprise

Infor Nexus (networked supply chains)

Infor Enterprise Asset Management

Infor Coleman (AI)

Infor Birst (analytics)

Infor Human Capital Management

Infor Workforce Management

Infor WMS

LINES OF BUSINESS

- Finance
- HR
- Distribution
- Manufacturing operations
- Supply chain
- Customer services

Business type suitability

Historically, Infor has been strongest in medium-sized organisations. This has evolved to now having a clear focus on substantial enterprise businesses as well, with many examples of active or complete implementations in larger enterprises. Many of the ERP solutions in the Infor product range have a wide functional footprint while others have a narrower focus (e.g. SunSystems for financial management). Consequently, there are solutions that fit traditional ERP customers and others that fit organisations with a narrower set of requirements, perhaps with a need to integrate to other internal line-of-business solutions – something Infor can also support using its ION integration platform.

SIZE OF BUSINESS

- Traditionally, Infor has been known for having a sweet spot of medium to 'early' enterprise customers. However, this has evolved throughout recent years and we now have a clear focus on substantial enterprise businesses.

Vertical suitability

By virtue of its broad product range in both ERP and line-of-business solutions like financial management

and enterprise asset management, Infor could offer a compelling solution to most verticals or business sectors. Having said that their pedigree is stronger in some areas than others. That pedigree extends across manufacturing in general and in particular in automotive and food & beverage sectors. Infor has particular strength in 'micro-verticals' within food & beverage manufacturing, including brewing, meat processing and baking. Infor ERP products are also well represented in industrial manufacturing and equipment, hi-tech, construction, distribution, equipment rental, retail, fashion, aerospace & defence and chemicals.

VERTICAL MARKETS

Automotive

Industrial manufacturing and equipment

Hi-tech

Food & Beverage

Construction

Distribution

Equipment rental

Retail

Fashion

Aerospace & Defence

Chemicals

Hospitality

Facilities management

Charities



Go-to-Market strategy

Infor addresses the UK market through a variety of channels including direct sales and implementation, partnerships with large systems integrators and consulting firms and channel partners. Infor lists eight active channel partners in the UK and, in general, these focus on the small to medium business market, which Infor defines as organisations having revenue below £250m. Infor sees its channel as a key component of its growth plans. Its stated channel partner mission is to be a high-growth cloud leader focussing on core CloudSuite solutions (CloudSuite Industrial, CloudSuite Distribution and Infor SunSystems.)

Licensing and pricing

Infor offers a range of pricing models across its product set. Subscription-based models dominate but perpetual licences are available for some products and deployment models. Typically, Infor ERP pricing is based on named users with HCM and compliance solutions based on employee numbers. Depending on the solution, subscription costs can include ancillary functions such as finite capacity scheduling which for some vendors tend to be sold as additional items. For the SaaS offerings, upgrades and technical support are typically included in the subscription as would be expected in a true cloud environment. As with many subscription models, discounts may be available for agreements that commit to multiple years.

Customers

KINGSPAN WATER AND ENERGY UK Kingspan has successfully deployed Infor LN enterprise resource planning (ERP) to help improve customer service, reduce inventory and accelerate the integration of new

acquisitions. The solution is now live for 500 users across 11 sites across Ireland, Northern Ireland and England, and was achieved with no disruption to operations.

RUSSELL ROOF TILES completed its upgrade to a multi-tenant instance of Infor CloudSuite Industrial. This is the third phase of an ongoing project designed to boost customer service and reduce lead times, manual processes and administration.

TRIUMPH MOTORCYCLES is live on Infor LN but we don't have any additional information regarding this customer.



KEY STRENGTHS OF THE PRODUCT

Infor's key strengths might be described as breadth of capability coupled with depth in those verticals that it focusses on. Its CloudSuite solutions should perform very strongly in any comparison in their focus verticals while M3, LN and Syteline are strong in various manufacturing, industrial and service operations environments. Infor's technology stack is maturing into a fully rounded offering. It has managed to develop its overall product set into a coherent suite of offerings with real depth over the last decade.

In terms of implementation, Infor has developed a methodology called Infor 60:30:10 which aims to deliver 60 percent of requirements using good practice implementation accelerators with more time being spent on solutioning customer specific differentiator requirements (30 percent) and highly differentiating requirements (10 percent). Perhaps this is more realistic than the clichéd 80/20 rule! Many vendors tout accelerators

or implementation templates in some shape or form. Their depth and success vary widely. If Infor can simplify complex ERP implementation with this approach it will certainly gain increased market traction.

Infor has been slow to develop its channel but there are signs that it is now succeeding with the first partner led implementation of M3 in the UK last year. M3 is perhaps the largest ERP in the portfolio so this represents a milestone of sorts.



EASE OF DEPLOYMENT AND KEY CONSIDERATIONS

Infor claims its dominant deployment model across its product range is now multi-tenant cloud. However, it does offer both single-tenant and multi-tenant options, as well as on-premise, for three of its main ERP solutions (M3, LN and Syteline). Overall, Infor cloud technologies serve more than 62 million users and approaching 15,000 customers worldwide. However, Infor remains committed to offering customers a choice. They see flexibility as a huge part of the attraction to cloud deployment and claim to be committed to not forcing upgrades, unlike some enterprise cloud applications. Infor's cloud solutions are deployed on Amazon Web Services.



DEPLOYMENT

- Infor products are available on-premise, multi-tenant or single tenant.



Microsoft offers two key ERP products as part of its Dynamics 365 suite of applications. The first is the snappily titled Dynamics 365 Finance and Supply Chain Management (F&SCM hereafter) which was formerly called D365 Finance and Operations and evolved from Dynamics AX. The other is Dynamics 365 Business Central which evolved from the Dynamics NAV product. The latest evolutions of both products are cloud first applications, but each can also be implemented on-premise. Microsoft is supported by a very strong partner channel and benefits from interoperability (some mature, some emergent) with its stack of business applications, cloud offerings, productivity tools and foundational platforms like Active Directory. Within the Dynamics suite alone the ERP products are augmented by other applications such as Customer Engagement (CRM) and the new Customer Data Platform. Both ERP products have major updates released twice per year with minor ones released monthly.

Key products

Dynamics 365 Finance and Supply Chain Management

Dynamics 365 Business Central

LINES OF BUSINESS

Dynamics 365 Finance and Supply Chain Management

- Finance
- Supply Chain Management (inc. but not limited to inventory management, warehouse management, manufacturing, supply chain planning)
- Commerce / Retail
- Project Management
- HR
- The wider Dynamics 365 Portfolio including customer engagement services, sales, marketing, customer service, CDP

Business Central

- Finance
- Sales and marketing
- Supply chain management
- Manufacturing
- Customer Service

Business type suitability

Dynamics F&SCM is most suited to medium to enterprise scale organisations while Business Central suits small to medium organisations. There is some overlap in the middle in terms of organisation size but typically F&SCM is most suited where multiple countries and companies are involved. Beyond organisation scale, breadth and depth of functional capability compared to project scope will be a determining factor. F&SCM covers finance, SCM (inventory, warehouse management, manufacturing, supply chain planning and more), retail and commerce, project management and HR. Business Central covers finance, sales and marketing, SCM, manufacturing and customer service. While the breadth of coverage is similar the depth of functionality in F&SCM is stronger.

SIZE OF BUSINESS

• **Dynamics 365 Finance and Supply Chain Management**

> Medium sized to large enterprise

• **Dynamics 365 Business Central**

> Small to medium sized businesses

Vertical suitability

Microsoft claims that both products are applicable to any vertical. While that may overstate things slightly it is true that both are widely used in product-based, service-based and not-for-profit organisations of a variety of stripes. Microsoft's ISV (independent software vendor) partners develop a range of vertical specific and niche add-ons which broaden this applicability further. In fact, it would be difficult to identify a vertical for which an ISV solution is not available for one or both Dynamics 365 ERP products. Like other vendors, Microsoft has a certified by Microsoft programme to ensure ISV products follow Microsoft standards and remain current with new release cycles.

VERTICAL MARKETS

Microsoft sells its products and services into virtually every vertical market

Go-to-Market strategy

Like all of the large ERP vendors, Microsoft has a multi-faceted go to market strategy including direct sales and a diverse channel of partners, from large consulting organisations

and systems integrators to dedicated channel partners, some with a niche focus and their own ISV add-on solutions. Arguably, Microsoft's ERP channel is larger than any other vendors (only SAP might challenge this) and it certainly is their primary sales and deployment model. Microsoft claims to have over 200 active partners in the UK. Direct sales are limited to medium and enterprise customers with channel partners covering everything from SME to enterprise scale.

Licensing and pricing

Most Dynamics 365 deals are now subscription-based though Business Central is also available on a perpetual basis. Dynamics applications are licensed based on 'assigned licences' that are dedicated to a named user or device and 'unassigned licences' that provide access to a feature or service at tenant level. There are a variety of assigned licence types covering full users, which provide access to a broad range of capabilities, and lighter additional users, for more limited access. Partners work with prospective clients to find the most suitable mix of users and to identify any additional unassigned licences that may be required for items such as additional environments or extra storage capacity.

Customers

SILENT POOL DISTILLERS

Silent Pool deployed Dynamics 365 Business Central and Power Platform to replace their largely paper-based processes to manage finance, purchasing, logistics, warehousing, sales, CRM and reporting. Having a single, complete solution has provided Silent Pool with the data and insights to quickly respond to changes in the market.

KFM, a provider of healthcare support services, uses Dynamics 365 Finance and Supply Chain Management to order, track & trace and pay for medical supplies and equipment. The implementation has consolidated processes that spanned multiple systems onto the single Microsoft platform. Since deployment, time taken to receipt goods has fallen by 70 percent and ordering times by 25 percent.



KEY STRENGTHS OF THE PRODUCT

Microsoft claims that F&SCM enables organisations to monitor the performance of financial operations in real-time, predict outcomes, and make data-driven decisions to drive agility and growth as well as breaking down data silos across an organisation's different lines of business. While some of this may be claimed of any modern ERP solution Microsoft adds that F&SCM customers increase finance productivity by 20 percent and cite Forrester Research findings of 60 percent ROI and 20 month payback. The key strengths of F&SCM lie in its functional breath, its evolution into an integrated application set firmly ensconced in Microsoft's ever evolving technology platforms on Azure and augmented by an ecosystem of other applications and tools, not to mention a dynamic partner network. Worth highlighting too is the low-code extensibility available with Microsoft's Power BI, Power Apps and Power Automate solutions. Business Central offers much of the same in terms of broad brush strokes but at a lower price point with less breadth and depth and in a package more suited to smaller organisations. Arguably, it is less

central to the overall Dynamics suite and so lacks some of the opportunities for integrated workflows with other Dynamics applications. It compensates with strong internal capabilities to provide an all-in-one business management solution for small to medium sized organisations.



EASE OF DEPLOYMENT AND KEY CONSIDERATIONS

Naturally, Microsoft limits its certified cloud deployment options to its own Azure platform. That is not a limiting factor for most organisations and a variety of deployment models are available. Dynamics 365 F&SCM is available as a single-tenant solution on Azure or on-premise. In practice on-premise deployments are rare now and some partners will not offer them at all. As F&SCM has evolved from the early versions of AX into a top-tier ERP solution, customers have really benefitted from the simplicity that cloud deployments offer compared to the infrastructural overhead of running such a sophisticated (and therefore complex) solution on-premise. Dynamics 365 Business Central is also available on Azure and on-premise. It is one of the few ERP solutions that offers the flexibility to deploy either as a multi-tenant or as a single-tenant cloud solution.

DEPLOYMENT

- **D365 Finance and Supply chain management**

> Single-tenant, on-premise

- **D365 Business Central**

> Multi-tenant, single-tenant, on-premise



Business applications behemoth Oracle is strongly represented at the top tier of ERP solutions with its Oracle Fusion Cloud ERP. It claims to be the industry's broadest and most integrated public cloud, creating business value for customers in every industry, functional domain, and geography. While these claims are brave they are not without warrant as Oracle has managed to successfully migrate and evolve the deep experience and capabilities of its legacy ERP functionality to a truly cloud-centric environment unlike some competitors that have continued to straddle cloud and legacy architectures. Oracle Cloud ERP can also integrate with the broader Oracle Fusion SaaS portfolio including human capital management, supply chain management, and customer experience to provide broader reach within a single cloud and technology stack.

Key products

Oracle Fusion ERP is comprised of eight modules:

- Accounting Hub
- Enterprise Performance Management (EPM)
- Financials
- Oracle Analytics for Cloud ERP
- Procurement
- Project Management
- Risk Management
- Supply Chain & Manufacturing (SCM)

LINES OF BUSINESS

Oracle supports virtually all lines of business within an enterprise



Business type suitability

As a tier 1 ERP solution, Oracle Cloud ERP is generally targeted at companies with \$200m in revenue and above or with 1,000 employees or more. Though there are significant volumes of customers below that scale it can be considered the sweet spot threshold. It provides most value in large multi-entity environments where the savings of its comprehensive cloud model can best be realised. Oracle Cloud ERP is sold across all geographies and while Oracle does not disclose regional breakdown of customers it is well represented in the UK. By some external estimates the UK is its second largest customer base after the US.



SIZE OF BUSINESS

- Oracle Fusion Cloud ERP is generally targeted at companies with \$200m in revenue and above, 1,000 employees and above, and across all industries and geographies.

Vertical suitability

Oracle sells its cloud ERP into all markets and verticals. These include: manufacturing; professional services; healthcare; life sciences; higher education; public sector; financial services; retail; oil and gas; utilities and leisure and hospitality. It is particularly well represented in professional services, financial services, and government as well as various manufacturing sectors. It has deep functionality to support all of these sectors and supports industry focussed business processes. The variety of channel and direct implementation options mean that customers can find implementation partners with deep vertical experience to help them get the most out of the technology.

VERTICAL MARKETS

Oracle sells Oracle Fusion Cloud ERP into all markets and verticals including manufacturing, professional services, healthcare, higher education, public sector, financial services, retail, oil & gas and utilities.

Go-to-Market strategy

Oracle sells and implements directly and through a variety of partners, including large systems integrators, large multi-practice consulting firms and specialist channel partners. While Oracle does not break out its partner numbers by location it is fair to say that the UK is well served through local Oracle presence, local partners and many large global partners having significant bases in the UK. Oracle keeps its partners supported and skilled through its Oracle Partner Network (OPN) partner programme. This provides partners with resources to train and support specialised knowledge of Oracle's products and solutions and opportunities to differentiate and develop to bring more value to their customers.

Licensing and pricing

Oracle Cloud ERP is priced on a subscription pricing model. Pricing is defined within modules, so that different functional components may have different pricing elements, allowing customers to only pay for the components they require. Pricing units are quantified by different metrics including named users, record or transaction volumes (for certain functions), per environment and by employee numbers for some HCM cloud elements.

Customers

OCADO GROUP is using Oracle Cloud ERP to adapt quickly and efficiently to changing customer needs by taking advantage of a scalable and flexible business platform that can support its immediate and long-term growth.

WEST MIDLANDS POLICE, using Oracle Enterprise Resource Planning (ERP), Human Capital Management (HCM) and Customer Experience (CX) solutions, have enabled the force to modernise processes across its HR,

finance, procurement and shared services departments, and provided an internal self-service portal allowing officers and employees to access critical information and back-office services quickly. The introduction of a cloud-hosted supplier portal also enhanced agile interaction between the force and its suppliers.

UNIVERSITY OF GREENWICH

is using Oracle Cloud ERP to integrate seamlessly with the existing Oracle Cloud HCM system, allowing the university to break down organisational silos, standardise processes and manage financial, planning and workforce data on a single integrated cloud platform to deliver a world class education.



KEY STRENGTHS OF THE PRODUCT

Oracle Fusion ERP's strengths lie in the depth of functionality that can be delivered in a fully subscription-based truly cloud environment. Rather than providing legacy ERP products in a hosted environment and calling it cloud, Oracle took its time and migrated functionality to a cloud architected environment, only releasing elements as they were ready. That has now reached the point where Oracle Cloud ERP is a true tier 1 cloud solution. Apart from leveraging the core business functionality of the legacy solutions Oracle has incorporated and continues to develop emerging technologies including AI, machine learning, and IoT, to broaden domain and industry-specific functionality. The depth of Oracle Cloud ERP functionality means it is one of the few solutions that is suitable for the largest enterprise scale organisations. A particular strength for public sector organisations is the fact that Oracle

provides a dual-region government cloud. This means that public sector transactional data and back up data can be stored on UK soil with two UK data centres and a dedicated internet backbone connecting them. It was designed in conjunction with UK Government and Defence Ministries according to security principles outlined by the National Cyber Security Centre.

EASE OF DEPLOYMENT AND KEY CONSIDERATIONS

As a true cloud delivered solution the technical complexity of implementing a tier 1 solution like Fusion Cloud ERP is significantly reduced during implementation. While it is typically delivered on Oracle's public cloud it is one of few clouds that are also available in total in a customer's own data centre. Oracle Cloud@Customer brings Oracle's complete portfolio of public cloud infrastructure, fully managed cloud services, and Oracle Fusion SaaS applications into the customer's data centre. This can address some of the concerns that customers in certain sectors still have with public cloud deployed solutions without incurring the inefficiencies inherent in private hosting. Oracle still enforces the customisation restrictions and update policies of its public cloud deployments so it can manage the solution with the same economies of scale and provide the associated savings to the customer.

DEPLOYMENT

- Oracle Cloud ERP runs on Oracle Gen 2 cloud infrastructure. However, it can also deliver its Fusion SaaS applications at the customer's data centre through its Oracle Cloud@Customer offering. For the UK public sector, Oracle also provides a dual-region government cloud, which is the only dual-region sovereign cloud for use by UK public sector customers.



QAD Adaptive ERP is the core solution in a suite of applications covering the broad range of business processes that a manufacturing organisation will require, including financials, customer & service management, supply chain, and manufacturing. It also provides capabilities in analytics, business process management and integration. While QAD does not have a HR module, it ticks the boxes for the vast majority of capabilities needed by manufacturers. In addition to the core ERP product, QAD's portfolio of related solutions includes products addressing quality management (EQMS), supply chain management (DSCP), and global trade and transportation management (GTTM).

Key products

QAD Adaptive ERP

QAD Enterprise Quality Management System (EQMS)

QAD DynaSys Digital Supply Chain Planning (DSCP)

QAD Precision Global Trade and Transportation Management (GTTM)

LINES OF BUSINESS

- Manufacturing
- Supply chain
- Financials
- Customer management
- Transportation management
- Strategic purchasing
- Supplier management
- Service and support
- Analytics
- Business process management



Business type suitability

The QAD Adaptive ERP solution is designed for and targeted exclusively at manufacturers of all sizes, from start-ups through SMEs and mid-market manufacturers operating on a single or small number of sites, to market-leading global companies. While suitable for smaller manufacturing organisations, it is a scalable solution that also provides a good fit for multi-national manufacturing organisations with multiple sites across different geographies. Typical QAD customers tend to be mid-market manufacturers, or divisions of larger organisations. The solution provides a broad range of functionality to support different manufacturing environments (discrete, process, batch, and mixed mode), across a range of verticals.

SIZE OF BUSINESS

- QAD has built a solid customer base of global Fortune 1000 and mid-market manufacturers. With a proven track record of more than 40 years of industry leadership, QAD is ideally qualified to meet the business and technology requirements of global manufacturing companies worldwide.

Vertical suitability

QAD's explicit growth strategy is to focus on 22 sectors across six manufacturing verticals: automotive, consumer products, food & beverage, high-technology, industrial and life sciences. As an example, with the life sciences vertical QAD focusses on life sciences contract manufacturing, diagnostics manufacturers, medical devices manufacturers, and pharmaceutical/biotechnology manufacturers. QAD engages with industry groups and standards bodies in these verticals to develop products and services to address evolving industry-specific needs. QAD have a long history in the automotive sector and it continues to be a major focus, accounting for 35 percent of revenue according to QAD's latest breakdown of revenue by vertical.

VERTICAL MARKETS

Automotive suppliers

Consumer products

Food and beverage

Life sciences

High technology

Industrial

Go-to-Market strategy

QAD sells and implements directly as well as indirectly through dedicated channel partners, and continues to expand and strengthen their partner network. In the UK market QAD sells directly and also has a single dedicated channel partner, Strategic Information Group (SIG). QAD partners now provide about four times as much consulting capacity as QAD's internal resources. This capacity is provided through dedicated channel partners such as SIG and, more recently, partnerships with large multinational service and consulting companies like Tata Consultancy Services, YASH, Infosys and Thirdware. This extended ecosystem enables QAD to offer support for large-scale global projects.

Licensing and pricing

QAD's Cloud offering is subscription based, and licensed principally on the basis of named users, limited named users (with access to a limited range of functionality) and purchase requisition users. Non-core cloud modules (e.g., quality management and manufacturing automation solutions) are licensed separately on a named user of device basis. Cloud subscriptions include support as part of the offering. QAD does, on a very limited basis, support enterprise subscription licensing for QAD Adaptive ERP, but typically only for large-enterprise scale implementations.

Customers

RENOLIT GROUP An international leader in the manufacture of high-quality plastic films and related products for various technical applications, RENOLIT uses QAD Adaptive ERP across multiple sites within several divisions around the globe. One notable feature is that RENOLIT has deployed the fully-integrated QAD's Enterprise Quality Management System (EQMS) solution.

GKN AUTOMOTIVE The largest global supplier of driveline technologies for the automotive industry, GKN Automotive has deployed QAD Adaptive ERP in the cloud globally across its manufacturing facilities, encompasses all core ERP functions as well as Cloud EDI for the entirety of the GKN business plus the QAD Precision Global Trade and Transport Management solution.

SAINT-GOBAIN The Saint-Gobain High Performance Solutions, a €7.5bn division of the Saint-Gobain corporation, designs, manufactures and distributes a range of materials and solutions for industrial applications. The division has standardised globally on QAD Adaptive ERP in the cloud including QAD Automation Solutions and Production Execution.

KEY STRENGTHS OF THE PRODUCT

QAD's depth of experience in providing solutions for manufacturers is undoubted, making QAD Adaptive ERP a very strong offering for any manufacturer falling within its target sectors. With a proven track record and a growing customer base, QAD also has a strong focus on helping manufacturers deal with the various day-to-day practicalities and compliance headaches of conducting business across multiple countries. Examples include support for the Making Tax Digital (MTD) requirements in the UK and reporting requirements mandated by the Chinese government. The breadth of the solution is another strong point, with modules such as CRM for manufacturers, field service management, quality management, enterprise asset management and production execution augmenting the traditional core manufacturing capabilities. From a technology perspective, the QAD Enterprise Platform provides a modern technology architecture, making it easier for manufacturers to develop and maintain additional

'last-mile' functionality where required. Extensions and new apps can be created in a low code/no code environment, reducing the need for intrusive customisations, and the modular design means upgrades can be applied selectively. QAD has invested in improving the user experience across both web and mobile, with intuitive personalisation options by role, activity and user, and embedded analytics.



EASE OF DEPLOYMENT AND KEY CONSIDERATIONS

QAD is deployed as a single tenant cloud solution with the option to deploy on dedicated virtual hosts. QAD, like most other ERP vendors, is actively pushing customers towards subscription-based licensing and cloud deployments. While on-premise deployments may still be available, new functionality will be released in the cloud version first. QAD's keen focus on six manufacturing verticals means that, in theory, QAD Adaptive ERP should be easier to configure and require fewer customisations. QAD Enterprise Platform, which enables the development of extensions and apps, plus integration with other enterprise applications, also enables less complex and faster implementations.

DEPLOYMENT

- QAD Adaptive ERP is a single tenant solution, meaning that the customer receives their own dedicated environments, with dedicated application code and databases. These can be deployed on dedicated virtual hosts for the customer if requested. Firewall rules and network/host-based segmentation separates the other customer environments.



SAP is the longstanding market leader in ERP but is much more than an ERP vendor now. SAP describes its range of offerings as an 'integrated framework for intelligent enterprises.' Effectively this means a set of applications, infrastructure and services that it divides into six categories: its foundational Business Technology Platform, covering services and applications from identity management to database technology, development platforms and intelligent technologies such as AI; business applications, covering a range of business applications including ERP as well as the newly acquired SAP Spotlight providing analysis of business process configurations; industry cloud providing a cloud platform through which the various solutions can be delivered; sustainability solutions to help customers meet the rapidly emerging demands of environmental, social and corporate governance; experience management solutions to build stakeholder engagement into business processes; and business networks including procurement networks such as the well-known Ariba. This review focusses on business applications and ERP in particular.

Key products

- SAP Business Technology Platform
- SAP Customer Experience portfolio
- SAP Digital Supply Chain portfolio
- SAP Digital Manufacturing
- SAP Human Experience Management Portfolio
- SAP Intelligent Spend portfolio
- SAP ERP Solutions:
 - SAP S/4HANA (multiple deployment options, single code line)
 - SAP Business ByDesign
 - SAP Business One
 - SAP ECC 6.0 (SAP ERP) legacy

LINES OF BUSINESS

- **SAP S/4HANA:** Asset Management; Finance; Human Resources; Manufacturing; R&D/Engineering; Sales; Service; Sourcing & Procurement; Supply Chain; GRC & Cybersecurity
- **SAP Business ByDesign:** Executive Management Support; Financial Management; Customer Relationship Management; Human Resource Management; Supply Chain Management; Project Management; Supplier Relationship Management; Compliance Management
- **SAP Business One:** Administration; Sales, Purchasing, Service; Financial Management; Project Management; Inventory & Distribution; Light Manufacturing

Business type suitability

SAP offers multiple ERP solutions ranging in suitability from the largest global organisations to SMEs. The flagship solution suite, S/4HANA, targets mid-sized to large organisations. It is available in multiple distinct flavours - a multi-tenant edition, a single-tenant edition on SAP's HANA Enterprise Cloud (HEC), a private cloud edition which is single tenant, subscription-based and available from multiple hyperscalers (Microsoft Azure, Google and AWS) and finally, on-premise. Business ByDesign is another multi-tenant cloud (HEC) ERP solution from SAP but targeted at the mid-market. The final solution, targeted at SMEs, is Business One, available on-premise, hosted or as a subscription-based single-tenant cloud solution.

SIZE OF BUSINESS

- **SAP S/4HANA:**
 - > Mid-sized to large business
- **SAP Business ByDesign:**
 - > Mid-size business
- **SAP Business One:**
 - > Small Business
- **(SAP ERP) legacy:**
 - > Mid-sized to large business

Vertical suitability

There is scarcely a vertical market not served by SAP ERP products, reflecting its long-standing pedigree, breadth of functional capabilities and strength of its delivery channels. SAP ERP solutions target many verticals in the following broad sectors: financial services; manufacturing, mining and mobility; public services; healthcare; consumer industries; energy and natural resources; service industries; sport and entertainment. While S/4HANA includes a functional breadth and depth that makes it applicable for large organisations in most sectors, Business ByDesign is best suited to services and project-based businesses while Business One is broad enough for SMEs in services and product businesses even including light manufacturing capabilities.

VERTICAL MARKETS

- Financial Services
- Manufacturing, Mining & Mobility
- Public Services
- Healthcare
- Consumer Industries
- Energy and Natural Resources
- Service Industries
- Sports and Entertainment

Go-to-Market strategy

SAP's industry focus extends beyond its product configurations to its go-to-market strategy. It has a rich channel partner network globally, with sixty-three active partners operating in the UK. SAP partners build, sell, service and run SAP solutions – adding expertise that extends reach, market penetration and functionality of SAP solutions to meet diverse customer needs. SAP's route to market includes direct sales and partner led engagements with partners ranging from large systems integrators and consulting firms to niche operators with a more boutique or tailored approach, sometimes with their own SAP certified add-on solutions with a specific focus on vertical or niche functional capabilities.

Licensing and pricing

A variety of pricing models exists across the SAP ERP product range reflecting the variety of deployment models available. S/4HANA is available as a pure SaaS model, as a licence subscription or as a perpetual licence. While going to print SAP announced a new bundled service model called 'RISE with SAP' which is billed as 'Business Transformation as a Service'. This appears to bundle S/4HANA solutions with other SAP technologies and hyperscaler cloud services into a single subscription and contract. Watch this space. Business ByDesign is only available as a pure SaaS subscription, reflecting its multi-tenant architecture, and Business One is available on a licensed subscription or as a perpetual licence.

Customers

VODAFONE Working with SAP and Accenture, Vodafone has established a single digital core based on S/4HANA with additional SAP products SuccessFactors, Concur and Ariba. The implementation's aim was to improve operational efficiency in business functions such as finance,

supply chain and IT, rolled out across 26 countries for over 130 legal entities.

BRAKES Brakes, a B2B food delivery service and a leading supplier to the food service sector in the UK, launched a new direct-to-consumer platform on the SAP Commerce Cloud in just seven days. With the COVID-19 pandemic this enabled Brakes to distribute food packages to UK households. The new consumer site is based on Brakes' existing B2B solution, which runs from the same code base.

DIXONS CARPHONE Dixons Carphone has implemented a range of SAP core applications in a hybrid cloud environment to transform efficiency in areas such as finance, procurement, HR and travel and expenses. Dixons Carphone also implemented a range of SAP cloud applications along with SAP S/4HANA to improve customer experience.

KEY STRENGTHS OF THE PRODUCT

The key strengths of SAP ERP solutions might be considered breadth and depth. Few solutions can compete with S/4HANA in terms of functional capabilities. That versatility extends to deployment options, though not all functional capabilities and extensibility options are available in all deployment models. In addition to the capabilities of S/4HANA, SAP offers a leading range of complementary solutions such as SuccessFactors for HCM, Concur for travel and expenses and the Ariba procurement network. All are strong contenders in their own markets and complement the S/4HANA solution very well. Recently SAP has positioned S/4HANA as the 'Digital Core' around which other solutions can be implemented to enable the digital transformation many organisations seek. The recent RISE announcement suggests that this focus on transformation will deepen with support for business process optimisation in the digital core. SAP Business Process Intelligence

potentially strengthens the foundations this core can provide to further digital initiatives. It will be interesting to see if SAP, and critically their partners, can make good on this potential and further strengthen their offering. Business ByDesign and Business One, in contrast to S/4HANA, have strength in their narrower focus. While not quite niche they both offer robust ERP solutions for smaller organisations – the former for service sector businesses primarily with the latter flexible enough for many SMEs that may not be comfortable with a multi-tenant solution.

EASE OF DEPLOYMENT AND KEY CONSIDERATIONS

SAP is often considered a complex solution to deploy. This relates primarily to S/4HANA and its predecessor ECC6. While there are undoubtedly examples of complex, lengthy and costly deployments they tend to be higher profile for SAP than for other vendors because of their market position and having many very large clients with more complex project environments. However, S/4HANA projects should be considerably simpler to deploy than ECC6 historically was, particularly for the multi-tenant and private cloud editions. A key factor to realising these simplifications, though, is finding an implementation partner that will maximise the capabilities of these newer deployment models.

DEPLOYMENT

- **SAP S/4HANA:**
 - > Multi-tenant, single-tenant, hosted, on-premise
- **SAP Business ByDesign:**
 - > Multi-tenant
- **SAP Business One:**
 - > Single-tenant, hosted, on-premise
- **(SAP ERP) legacy:**
 - > Hosted, on-premise

UNIT4

Unit4 is a major player in ERP for people-centric organisations, with offerings firmly focussed on the needs of organisations who don't make, maintain or move physical products. Unit4 offers three main products: Unit4 Enterprise Resource Planning (ERP), formerly Unit4 Business World, and prior to that Agresso; Unit4 Financial Planning & Analysis (FP&A), formerly Prevero; and Unit4 Human Capital Management (HCM). The HCM and FP&A products can be sold as best-of-breed solutions, or as part of an integrated Unit4 solution.

Unit4 People Experience Suite is used to describe solutions encompassing some or all of ERP, HCM, FP&A, and other niche Unit4 products, all delivered on Unit4 People Platform, a micro-services-based integration suite. 2021 sees a further major evolution in this direction with the release of Unit4 ERPx - available from this month - a fully integrated ERP, HCM and FP&A solution built on Microsoft Azure cloud infrastructure.

Key products

Unit4 ERP

Unit4 FP&A

Unit4 HCM

The People Experience Suite

LINES OF BUSINESS

• **Unit4 ERP** delivers a full ERP suite of financial management; human resources and payroll; planning, budgeting and forecasting; procurement management; project management; and enterprise asset management services-centric offerings

• **Unit4 FP&A** delivers a software solution for financial planning, budgeting and forecasting, financial consolidation, reporting, and analysis

• **Unit4 HCM** offers the spectrum from onboarding to modern performance management and learning management.

Business type suitability

Typical Unit4 customers are people-centric and/or service-centric organisations with between 200 and 10,000 employees, and with turnover of £150m and upwards for commercial organisations. Unit4's products are suitable for large organisations operating in multiple countries, and are sold, deployed and supported globally. Service-based and people-based organisations with a large workforce who are struggling to manage environments where multiple systems are used to manage financials, people, projects, planning and business intelligence should consider Unit4's solutions.

Unit4 offers a choice of deployment options for ERP (on-premise, single-tenant and multi-tenant cloud), with on-premise and single-tenant cloud options for FP&A and multi-tenant cloud for HCM.

SIZE OF BUSINESS

• Suitable for all markets, but its focus is mid-market -200-20,000 employees, \$200m to \$1bn plus.

Vertical suitability

Unit4's target markets for its ERP and FP&A products are principally higher education, public services, not-for-profit, professional services organisations, and people-centred services organisations, while the HCM product has a narrower focus on professional services organisations and the public sector. Within those verticals there are a number of significant sweet spots for Unit4. This includes local government, where Unit4 has historically been very strong, government agencies, and universities. Large project management-based, engineering and architecture consultancy practices are a key focus within professional services.

VERTICAL MARKETS

• **Unit4 ERP:** People centred services industries, higher education, public services, not-for-profit, professional services organisations

• **Unit4 FP&A:** People centred services industries, higher education, public services, not-for-profit, professional services organisations

• **Unit4 HCM:** Professional services organisations, public sector

Go-to-Market strategy

Unit4 sells and deliver its solutions both directly and through a partner network comprising dedicated channel partners, systems integrators and consulting firms. Building a partner ecosystem is a key element of Unit4's strategy, with a range of different partner models and levels (select, premier and elite). Go-to-market partners sell, implement and support Unit4 solutions, service partners are extensively trained on Unit4 solutions to enable fast implementation, integration solutions, and support services, while technology & innovation partners enhance the functionality and performance of Unit4 solutions through software extensions and integrations. Unit4 currently has 26 active partners in the UK.

Licensing and pricing

Both perpetual and subscription licensing are available for the ERP and FP&A products, with subscription pricing only for the HCM product. Unit4 ERP licence costs are calculated using a Full-Time Equivalents (FTE) users metric, with a view to simplifying the licensing model and concerns over the number and types of user licences required. This licensing model, which is common for people-centric and HCM solutions, covers full-time, part-time, and temporary employees, plus potentially volunteers in the not-for-profit sector.

FP&A is licensed on the basis of solution elements required, and named users of different types (modelling, planning, analytics) depending on their role in using the software.

Customers

EAST OF ENGLAND AMBULANCE SERVICE NHS TRUST Eeast provides 24 hours, 365 days a year accident and emergency services to those in need of emergency medical treatment and transport in Bedfordshire, Hertfordshire, Essex, Norfolk, Suffolk and Cambridgeshire.

The service receives more than one million emergency calls each year. They have deployed Unit4 ERP and FP&A.

FOREST RESEARCH Forest Research is Great Britain's principal organisation for forestry and tree related research and is internationally renowned for the provision of evidence and scientific services in support of sustainable forestry. They have over 250 staff across England, Scotland and Wales, and have deployed Unit4 ERP.

SOUTHAMPTON CITY COUNCIL

Southampton City Council is the unitary authority for Southampton on the south coast of England, comprising approximately 254,000 residents. They have deployed Unit4 ERP, spanning finance, procurement, HR, payroll, and more, supporting the council in the delivery of more than 400 services to citizens.

KEY STRENGTHS OF THE PRODUCT

Unit4 ERP provides financials; human resources and payroll; procurement management; project management; and enterprise/estate asset management services. FP&A delivers financial planning; budgeting and forecasting; financial consolidation; reporting and analysis. HCM offers advanced HR functionality, from recruitment through onboarding to performance and learning management.

A key strength for Unit4 lies in their long heritage of providing people-centric solutions for organisations in their target verticals. The not-for-profit sector is a good example, with Unit4 providing functionality to support requirements in areas such as grant management, projects, and auditing/compliance reporting.

The big news for Unit4 in 2021 is clearly ERPx, described as 'next-generation cloud ERP', utilising Microsoft Azure's public cloud platform. Initially launched in October 2020, ERPx is being rolled out to customers from March 2021. The key for any software vendor is to have

existing customers adopt a new platform such as ERPx, and Unit4 announced global not-for-profit Americares as the first of ten early adopters already on board. The ERPx cloud platform supports a range of features such as: enabling process automation and improved efficiencies through artificial intelligence and machine learning; a microservice architecture; low-code toolkits providing an easier path to system extensions and integrations; and an improved user experience.

EASE OF DEPLOYMENT AND KEY CONSIDERATIONS

While many organisations considering Unit4 solutions may be satisfied with the standard financial reporting and analysis provided by Unit4 ERP, the FP&A solution provides a range of functionality that is likely to be attractive to larger or more complex organisations, such as financial consolidation and corporate performance management. FP&A's capabilities will likely be a fundamental element in delivering business benefits in such organisations. Availability of Unit4 resources has been noted as a concern in the past by some analysts, but Unit4 has addressed this through a major acceleration in its partner programme in preparation for ERPx, with 22 new partners onboarded during 2020 according to one report.

DEPLOYMENT

- **Unit4 ERP**
 - > On-premise
 - > Single-tenant (shared and dedicated deployment)
 - > Multi-tenant
- **Unit4 FP&A**
 - > On-premise
 - > Single-tenant (shared and dedicated deployment)
- **Unit4 HCM**
 - > Multi-tenant



Workday has emerged as one of the big success stories in the world of ERP over the last 15 years. In an industry not generally noted for the emergence of new players - all of the other vendors featured in this review have been around for considerably longer in some shape or form - Workday has risen from a start-up in 2006 to a position towards the top of the charts. And it shows every sign of staying there, with continuing strong growth over recent years and over 1,300 customers in the UK. While originally best known for its HCM offering, Workday now boasts a much broader solution suite, making it suitable for a wide range of business types and industries. Workday's multi-tenant solution means every customer is on the same version. New functionality is added regularly, and the company has also been active in acquiring complementary solutions.

Key products

- Adaptive Insights Business Planning Cloud
- VIBE Central
- VIBE Index
- Workday Skills Cloud
- Workday Talent Marketplace
- Workday Adaptive Planning
- Workday Financial Management
- Workday Spend Management
- Workday Human Capital Management
- Workday Payroll
- Workday Analytics
- Workday Professional Services Automation
- Workday Student
- Workday Cloud Platform
- Workday Talent Management
- Workday Benchmarking
- Workday Data Hub
- Workday Augmented Analytics
- Workday Prism Analytics
- Workday Accounting Center
- Workday Vaccine Management

LINES OF BUSINESS

- HR
- IT
- Sales
- Finance
- Accounting

Business type suitability

Workday's suite of products covers finance, procurement, human capital management, planning and analytics, which effectively means it could be deployed by organisations in any sector. Workday customers are often mid-size and large global multi-nationals. The full suite tends to be used as a corporate-level solution, and by organisations in service-centric and people-centric sectors. Workday HCM has a much broader target market, and is a market-leading solution in its own right, as is the highly-regarded Workday Adaptive Planning which provides financial, workforce, sales and operational planning.

SIZE OF BUSINESS

- Workday is suitable for mid-sized to large enterprises.

Vertical suitability

Workday is used across a broad and diverse range of sectors as communications, energy and resources, financial services, government, healthcare, education, hospitality, insurance, life sciences, manufacturing, media and entertainment, non-profit, professional

and business services, retail, and technology. Workday's history and reputation as a HCM solution makes it a strong candidate for organisations with large numbers of employees. Workday competes at the higher end of the market, facing competition from the likes of SAP, Oracle and Microsoft in larger enterprises, more focussed vendors such as Unit4 for people-centric organisations, and specialist HCM vendors.

VERTICAL MARKETS

- Retail
- Financial Services
- Professional and business services
- Communications
- Energy and Resources
- Government
- Healthcare
- Higher Education
- Hospitality
- Insurance
- K-12
- Life Sciences
- Manufacturing
- Media and Entertainment
- Non-profit
- Technology

Go-to-Market strategy

Workday has developed an ecosystem of services partners across the globe, and has a stated aim of expanding this further to support local deployments. Services partners are an important element in Workday's overall go-to-market strategy, with the majority of customers using partner services for deployments rather than contracting directly. Workday's own professional services team focus on more complex projects, strategic clients and implementations involving new features. There are various partner types, covering advisory services, deployment services and application managed services. Partners range in scale from 'boutique' to major regional or global organisations. Partners may specialise in specific products, industries, or functional areas.

Licensing and pricing

Workday subscription costs for core financial and HCM modules are based on the number of Full-Service Equivalent (FSE) workers in your organisation. This is Workday's pricing metric which converts the total number of workers in an organisation into a weighted equivalent based on the number of workers in various categories. For example, each salaried worker may be equal to one FSE, whereas four part-time workers may equate to one FSE. When engaging with Workday it is advisable to know how your workforce breaks down by categories to inform discussions on subscription costs, particularly for organisations with significant part-time or seasonal workforces.

Customers

ALDI International supermarket chain Aldi has gone live with Workday over the past quarter to enhance employee experience, facilitate its drive to become paperless, support robust GDPR processes, augment compliance and provide real time insights via live, accurate and dynamic reporting. Aldi

will roll out Workday across the 40,000 employee business in Q2 2021.

EQUINITI As a global financial services company providing back-office services for listed companies, Equiniti uses Workday Financial Management and Human Capital Management. The company employs about 5,000 people, with 500 in the US, and just under 1,000 in Chennai, India, where all the back-office services for IT, finance, HR, and operations are supported.

JOHN LEWIS A household name in the UK through John Lewis department stores and Waitrose supermarkets, John Lewis Partnership deployed Workday Human Capital Management and Payroll in the midst of the COVID-19 crisis, helping its 84,000 employees access payslips, check time sheets and change bank details wherever they were.

with the core solution takes time. Workday also continues to invest in its core applications, and 2020 saw a number of new offerings: VIBE Central and VIBE Index, to help advance belonging and diversity (B&D) initiatives, Talent Marketplace, a talent mobility solution, Workday Accounting Centre and machine learning (ML) driven predictive forecasts for Workday Adaptive Planning.

The Power of One concept extends to the Workday Community, a network of almost 100,000 Workday users. Customers can share, learn, and collaborate with other users, as well as influence the direction of Workday applications.



EASE OF DEPLOYMENT AND KEY CONSIDERATIONS

Workday solutions have fared very well in recent coverage from industry analysts, and is now firmly established as a credible option for mid to large organisations in its target sectors. Workday touts its consistently high customer satisfaction ratings, and uses this as a key selling point. There is good availability of resources globally through the partner networks, an important consideration for global organisations. Unlike many cloud ERP suites, Workday was developed for the cloud as a multi-tenant solution, and has no legacy pre-cloud technological heritage. That model tends to favour using standard out of the box functionality rather than customisation.

DEPLOYMENT

- All workday products and services are available as multi-tenant SaaS



KEY STRENGTHS OF THE PRODUCT

A significant selling point for Workday is what they describe as "the Power of One": a single application with a single user experience, database, security model and code base, in comparison with some other solutions which are comprised of many moving parts. That said, the core of financials and HCM has been augmented through acquisitions to provide a more rounded and compelling suite of solutions. Notable additions in recent years include Scout RFP, a strategic sourcing and supplier engagement solution, Adaptive Insight's Planning solution (which will continue to be sold as a best-of-breed planning solution) and more recently Peakon, an employee engagement app. As with any acquired products, integration



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